



CENTENE  
**Workbench**

**wellcare**

TM

# Centene Workbench: Contract Re-Certification Process

## External Guide

# Purpose of this Document


**With this guide, all brokers and agencies will be able to:**

- Complete Contract Re-Certification in their Centene Workbench Portal.
- Steps will include verifying Demographic and Payment Information, Selling States, signing the 2024 Third-Party Marketing Entity (TPME) Agreement and W9.

**Please Note:** *Licensed-Only Agents and Dual-Assignment Agents will not be prompted to update payment information.*

- Print Contract and W-9 documents once completed

## Icon Use:

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# Logging into PingOne

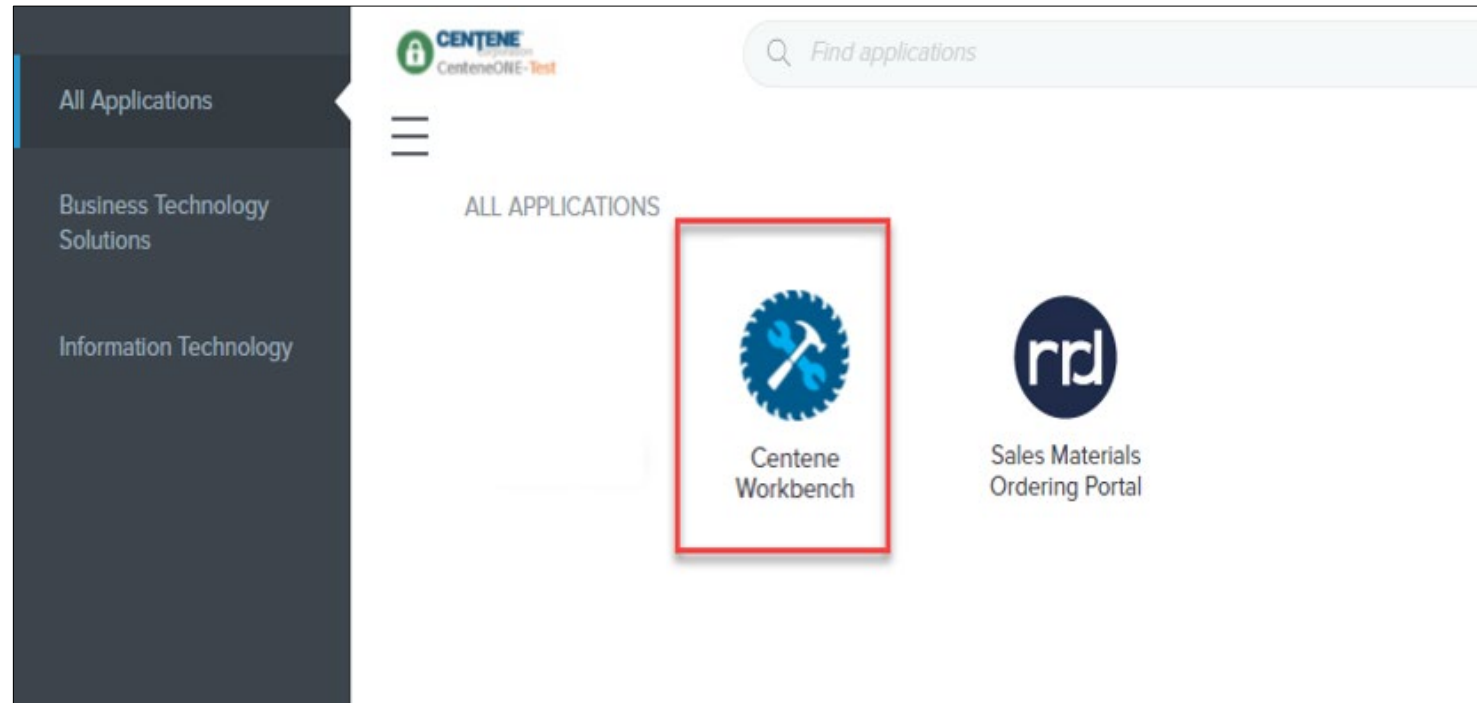
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# Logging into PingOne

To access the Contract Re-Certification, please log into your Broker Portal, through your PingOne access in Centene Workbench.

**Note:** For assistance with accessing PingOne, please follow the link to the PingOne Guide.



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# Verifying Notifications in Broker Portal

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# Accessing My Certification Cases from Navigation Menu

- Access the Contract Re-Certification by selecting from the Navigation Menu:
  - **My Credentials > My Certification Cases > Start.**

The screenshot displays the CENTENE Workbench interface. On the left is a blue navigation menu with the following items: DASHBOARD, STATEMENTS, BOOK OF BUSINESS, PAYMENT HISTORY, APPLICATION STATUS, DOCUMENTS & RESOURCES, MY CREDENTIALS (highlighted with a red box), MY ACCOUNT, SUPPORT TICKETS, and WORKFLOWS. The 'MY CREDENTIALS' dropdown menu is open, showing 'My Certification Cases', 'Manage My Licenses', and 'My Status & Credentials'. The main content area features a table with columns: Name, LOB, Year, Type, NPN, Sales Level, Affiliated Agency/Team, Submitted By, Creation Date, and Status. A single row is visible, with a 'START' button highlighted in a red box on the left and a 'Created - New' status highlighted in a red box on the right. Below the table, a modal window titled 'Recertification' is displayed, containing the following text: 'The 2024 Contract Recertification case is available for you to complete. You will be prompted to (1) verify Demographic, Payment Information, and Selling States and (2) sign the 2024 TPME Agreement and W9. Please Note: Licensed Only brokers and Dual Assignment brokers will not be prompted to update payment information. IMPORTANT! This is part of the annual certification requirements and must be completed by September 30, 2023 to avoid suspension from marketing / selling Wellcare products.' At the bottom of the modal are 'CLOSE' and 'CONTINUE' buttons.

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
[REDACTED]	Medicare Advantage	2024	Contract Recertification	[REDACTED]	Broker		Loader, File	06/29/2023	Created - New

- You can view the status of the case on the right-hand side under **STATUS**.



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# Completing The Contract Re-Certification Case

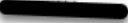

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# Completing The Contract Re-Certification

1. Once logged into **Centene Workbench**, you will see the pending contract re-certification to complete.
2. Select **Start**.

Name	LOB	Year	Type	NPN	Sales Level	Affiliated Agency/Team	Submitted By	Creation Date	Status
	Medicare Advantage	2024	Contract Recertification		Broker		Loader, File	06/29/2023	Created - New

Showing 1 to 1 of 1 entries

FIRST PREVIOUS 1 NEXT LAST



# Completing The Contract Re-Certification: Demographics

1. Select the **Demographics** tab under **My Certification Cases**.
2. Your Demographics information will automatically load in from your account profile.

**Note:** Name, Tax ID, NPN, Email, Business Address information is pulled from NIPR and cannot be edited.

3. Ensure to review and/or update the following information in your Demographics:
  - **Mobile Number:** Required
  - **Business Number:** Required
  - **Marketing Number:** Optional
  - **Secondary Email:** Optional
  - **Shipping Address:** Required

**Note:** Please do not use a PO Box for Shipping Address.

4. Select continue to move on to the Payment section.

My Certification Cases

DEMOGRAPHICS PAYMENT STATE LICENSES SUBMIT

Fields marked with an asterisk (\*) are required.

Personal Information

First Name\* [input field]  
Middle Initial [input field]  
Last Name\* [input field]  
SSN\* [input field]  
NPN\* [input field]  
DOB\* [input field]  
Mobile Phone\* [input field]  
Business Phone\* [input field]  
Marketing Phone [input field]  
Email\* [input field]  
Secondary Email [input field]  
Job Title [input field]

My Certification Cases

DEMOGRAPHICS PAYMENT STATE LICENSES SUBMIT

Shipping Address Information

Shipping Address Same as Residence?\*  No

Address 1\* [input field]  
Address 2 [input field]  
City\* [input field]  
State\* [dropdown menu]  
Zip Code\* [input field]

Broker Information

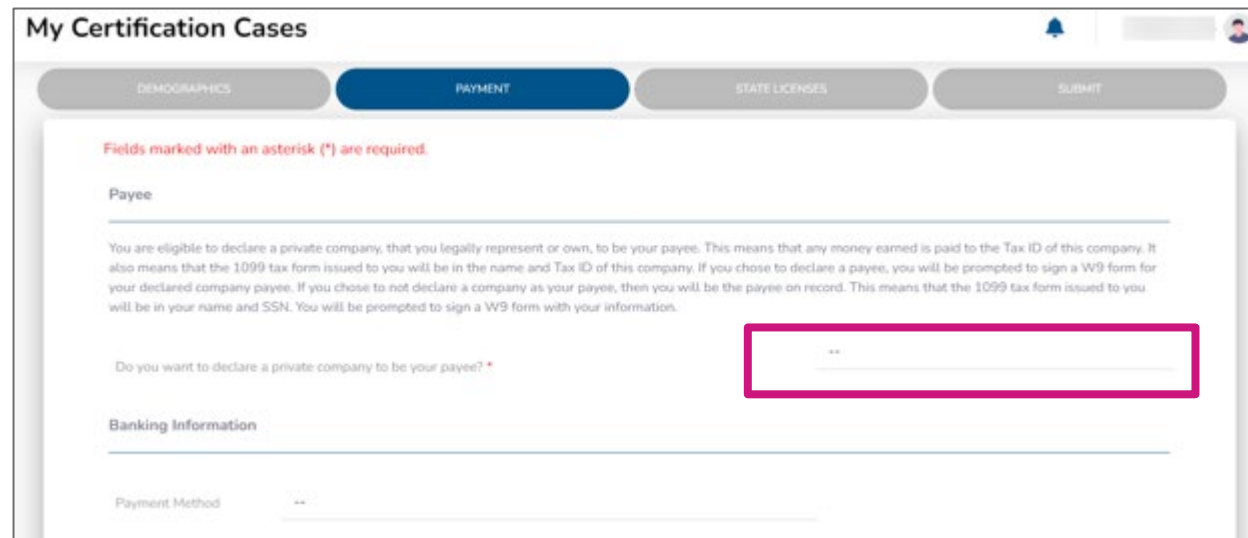
Broker Type [input field: Field Broker]



# Completing The Contract Re-Certification: Payment

## Direct and Downline Only Sub Type Payment Steps

1. Review your current payment information and update, as necessary.
  - Select **Yes** if you own an Agency and you wish to assign the Agency as the Payee.
  - Select **No** if you do not wish to declare the Agency as the Payee.



**My Certification Cases**

DEMOGRAPHICS **PAYMENT** STATE LICENSES SUBMIT

Fields marked with an asterisk (\*) are required.

**Payee**

You are eligible to declare a private company, that you legally represent or own, to be your payee. This means that any money earned is paid to the Tax ID of this company. It also means that the 1099 tax form issued to you will be in the name and Tax ID of this company. If you chose to declare a payee, you will be prompted to sign a W9 form for your declared company payee. If you chose to not declare a company as your payee, then you will be the payee on record. This means that the 1099 tax form issued to you will be in your name and SSN. You will be prompted to sign a W9 form with your information.

Do you want to declare a private company to be your payee? \*

**Banking Information**

Payment Method

**Note:** Declaring the Agency as a payee is not the same as an Assignment of Commissions. If you wish to update your AOC, this needs to be changed in the “My Hierarchy Info” section in Centene Workbench. If Agency is assigned as Payee, be advised that you must be listed as an Authorized Owner on the bank account.



# Completing The Contract Re-Certification : Payment

## Direct and Downline Only Sub Type Payment Steps

### Payee Entity Assignment:

- If you selected **Yes**, provide the required payment information for this entity as well as a W9.

**Note:** If you own an Agency and assign the Agency as your payee, your 1099 will be in the name of that entity.

- Once all information is provided, select **Continue**.

Do you want to declare a private company to be your payee? \* Yes

*As you declared "yes", you will need to provide additional information regarding your payee in the section below. The information you enter below will be used to electronically generate a IRS W-9 Form.*

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**Business Entity Information**

Taxpayer ID Number\* \_\_\_\_\_

Business Name DBA\* \_\_\_\_\_

Business Address\* \_\_\_\_\_

Business City\* \_\_\_\_\_

Business State\* -- \_\_\_\_\_

Business Zip\* \_\_\_\_\_

**W-9 Information**

Taxation Type\* -- \_\_\_\_\_

I declare that I am legally authorized to execute contracts and agreements on behalf of myself or the legal entity I represent. \*

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**Banking Information**

Payment Method ACH (Direct Deposit) \_\_\_\_\_

Account Type\* Checking \_\_\_\_\_

[?] Account Number\* .....

Verify Account Number\* .....

[?] Routing Number\* [REDACTED] \_\_\_\_\_

Financial Institution\* [REDACTED] \_\_\_\_\_

**CONTINUE**



# Completing The Contract Re-Certification : Payment

## Direct and Downline Only Sub Type Payment Steps

### No Payee Entity Assignment:

- If you selected **No**, provide the required payment information for yourself.
- Once all information is provided, select **Continue**.

#### Banking Information

Payment Method	ACH (Direct Deposit)
Account Type *	Checking
[?] Account Number: *	.....
Verify Account Number *	.....
[?] Routing Number: *	104913912
Financial Institution *	PINNACLE BANK

CONTINUE



# Completing The Contract Re-Certification : Payment

## Licensed-Only Agent and Dual-Assignment Sub Type Payment Steps


- For the abovementioned Sub Types, commissions are assigned to the Upline, and no payment information is required.
- No actions are required during this step. Select **Continue**.

Fields marked with an asterisk (\*) are required.

Banking Information

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Based on your current sub-type, no additional data is needed within this section. Please click "Continue" to proceed.



**CONTINUE**



# Completing The Contract Re-Certification : State Licenses

1. Review your current selected selling states.
2. You can also select additional licenses that you wish to market and sell Wellcare products for.
3. Once license section has been reviewed, select **Continue**.

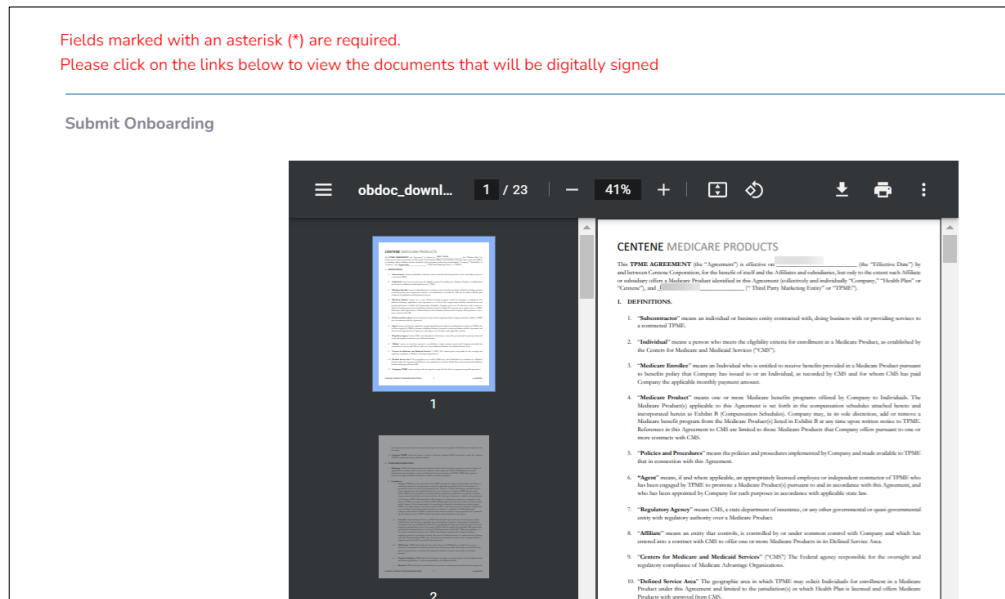
<input checked="" type="checkbox"/> ME - Maine	<input checked="" type="checkbox"/> WI - Wisconsin
<input checked="" type="checkbox"/> MI - Michigan	<input checked="" type="checkbox"/> WV - West Virginia
<input checked="" type="checkbox"/> MN - Minnesota	<input type="checkbox"/> WY - Wyoming

[CONTINUE](#)



# Completing The Contract Re-Certification: Submit

1. Prior to submitting this Contract-Recertification case, you will be able to review the 2024 Third-Party Marketing Entity (TPME) Medicare Agreement (including summary of changes) and your W9.
2. To submit your Contract Re-Certification case, review and acknowledge the statements below. Use the open space to complete your signature, and then select **Submit**.



Contract Application

W9

I have read and agree to the terms and conditions of the contract

I understand that my submission of this application means that I have read and understand the center application, and that I confirm that the information I have provided is accurate.

Date \* 06/30/2023

IP Address \* [REDACTED]

Please sign your name in the space below.

[REDACTED SIGNATURE AREA]

CLEAR

SUBMIT





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# Contract Re-Certification Completed

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# Contract Re-Certification Completed

Once you have successfully submitted your Contract Re-Certification case, you will receive the following message regarding next steps. You will also be given the ability to download the Third-Party Marketing Entity (TPME) Agreement and W9. (These documents are also located in the broker profile under the Documents & Resources tab.)

**Note:** If you are Re-Certifying as an Agency, please ensure your Principal completes the Contract Re-Certification process as well.

Submission Successful!

Thank you for completing your contract as part of the 2024 Annual Certification Requirement.

Below is a copy of your signed contract and W9. Please download and/or print a copy for your records. These document will also be stored in your portal under Documents & Resources - My Documents.

If you have not done so already, please ensure to complete the 2024 Annual Certification training prior to September 30, 2023 to ensure to avoid suspension from marketing and selling Wellcare products.

[Download Contract](#)

[Download W-9](#)

Broker Name	██████████
Email	██████████
NPN	██████



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# 2024 NEW Profile Enhancement- Ready To Sell Widget

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# 2024 NEW Profile Enhancement- Ready To Sell Widget

## INDIVIDUAL BROKER VIEW

If you are viewing as a Broker without a direct reporting downline, the Ready To Sell Profile widget will give you a view of your current status, as well as display when you are fully Ready To Sell per the completed requirements.

The image displays two screenshots of the CENTENE Workbench dashboard, illustrating the 'Ready To Sell' widget for a broker. Both screenshots show a navigation sidebar on the left and a main dashboard area with three primary widgets: 'My Credentials', 'Commission Statement History', and 'My 2024 AEP Status'. Below these are sections for 'Quick Links' and 'New Application Status'.

**Top Screenshot (Pending Status):**

- My Credentials:** Broker Status: Active/Certified; State Licenses: 4 Active | 2 Inactive.
- Commission Statement History:** Table with columns: Statement Date, Statement Description, Total Commission.
- My 2024 AEP Status:** 2024 Recertification Pending; 2024 Training in WCW Pending.

**Bottom Screenshot (Ready Status):**

- My Credentials:** Broker Status: Active/Certified; State Licenses: 2 Active.
- Commission Statement History:** Table with columns: Statement Date, Statement Description, Total Commission.
- My 2024 AEP Status:** You have completed all requirements for 2024 AEP readiness! (indicated by a green checkmark).



# 2024 NEW Profile Enhancement- Ready To Sell Widget

## AGENCY VIEW

If you are viewing as an Agency, the Ready To Sell profile widget will give you a view of your downline so you are able to see everyone's Ready To Sell Status. To view the downline, click the "View Details" button located in the widget window.

The screenshot displays the CENTENE Workbench interface. The top section, titled "Broker Credentials", features three widgets: "My Credentials" (showing "Active/Certified" status and "4 Active" licenses), "My 2024 AEP Status" (displaying a green checkmark and a message: "Your agency and principal have completed all requirements for 2024 AEP readiness!"), and "My Downline's 2024 AEP Status" (showing "2024 AEP Ready Brokers: 2" and "2024 AEP Incomplete Brokers: 1"). Below these are "Quick Links" and "New Application Status" sections.

The bottom section shows a detailed view of the "My Downline's 2024 AEP Status" widget. It includes a search bar and several download buttons: "DOWNLOAD BROKER STATUS", "DOWNLOAD LICENSE INFO", "DOWNLOAD TRAINING INFO", "DOWNLOAD CONTRACT INFO", and "DOWNLOAD APPOINTMENT INFO". A table lists the downline brokers with their details:

	Broker Name	Broker Type	Broker NPN	Broker Status	2024 AEP Status	License Status
View Details	[Redacted]	Field Broker	[Redacted]	Active/Certified	Ready	3 Active   0 Expired
View Details	[Redacted]	Field Broker	[Redacted]	Active/Certified	Ready	15 Active   0 Expired
View Details	[Redacted]	Field Broker	[Redacted]	Active/Certified	Incomplete	9 Active   0 Expired



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# Questions?

